



CITY OF LODI COUNCIL COMMUNICATION

AGENDA TITLE: Adopt Resolution Authorizing the City Manager to Allocate \$82,500 in Public Benefit Program Funds for Five (5) Programs; and Authorize the City Manager to Execute Contracts with Four (4) Different Entities to Assist in Managing These Programs (EUD)

MEETING DATE: June 4, 2008

PREPARED BY Electric Utility Director

RECOMMENDED ACTION: Adopt a resolution authorizing the City Manager to allocate \$82,500 from the Lodi Public Benefits Program fund for five programs, and authorize the City Manager to execute contracts with four different entities to assist in managing these various programs.

BACKGROUND INFORMATION: Lodi Electric Utility has provided a pair of unique and engaging *educational* programs for Lodi students and educators over the past several years. Under California law, all electric service providers in the state must maintain a Public Benefits Program, incorporating four major elements: 1) assistance for low-income customers, 2) renewable energy resources & technologies, 3) demand-side management/energy efficiency, and 4) energy research. These two educational programs are categorized as energy efficiency (*Lodi LivingWise Program*) and renewable energy resources (*Lodi Solar Schoolhouse Project*). Below is a description of these two educational programs:

> **Lodi LivingWise Program:** Nearly 2,450 Lodi students and their families have participated in this program since 2003. The program provides students and educators at Lodi area schools with a useful tool that demonstrates energy and water conservation. The budget for the 2008-2009 school year (Lodi fiscal year) is \$20,000. The funds allocated are paid to Resource Action Programs of Modesto, California. This firm provides the energy efficiency kits (please see next paragraph) to the classrooms, schedules delivery of said kits to meet the individual teacher timframes and produces a school-by-school report of efficiency savings once the program year is complete.

For the 2008-2009 school year, Lodi Electric Utility staff is once again proposing to provide 437 energy and water conservation kits to 6th grade students throughout Lodi. Each kit contains a compact fluorescent lamp, an Electro luminescent (energy efficient) Night Light, a low-flow showerhead, faucet aerators, a water leak test for toilets, tips on energy/water conservation, specific ways to weatherize/insulate the home, and more. Once the kits are delivered to the classroom, and the teacher has received their training packet, students are instructed on how/why to implement the contents of the kit at their home. There are pre-installation and post-installation course discussions that are provided to the instructors to ensure that the students are fully engaged in the project. After the students have installed the contents of their kit at home, an assessment is produced by Resource Action Programs staff to determine projected energy and water savings associated with the installation of the various

APPROVED: 13
Blair King, City Manager

energy/water conservation measures. To "kick-off" the project, an Electric Utility *staff* member will attempt to visit each classroom to reinforce the significance of the project and discuss the importance of energy/water conservation.

While the project educates students on the importance of energy/water conservation, it also complements the energy education curriculum mandated by the State of California for all 4th through 6th grade students. Teacher feedback continues to indicate that our program is an excellent "fit" for portions of their math, science and or energy education curriculum. The Lodi *LivingWise Program* was implemented in thirteen (13) sixth-grade classrooms throughout the community during the 2007-2008 school year.

> **Lodi Solar Schoolhouse Project**: Since 2002, over 1,200 Lodi students have been involved in one aspect or another of this project. The Lodi Solar Schoolhouse *Project* is aimed at educating students in grades 3rd through 12th regarding the importance of renewable energy resources, like the sun and wind, and the critical role these energy resources will most likely have on their future.

To assist in implementing this program, Electric Utility staff will again utilize the professional services of The Rarus Institute, a not-for-profit organization based in Martinez, California. For the 2008-2009 school year (and Lodi fiscal year), the Lodi Solar Schoolhouse *Project* will have several key elements, including: 1st Annual Solar Schoolhouse Discovery Day, the Solar Schoolhouse Summer Institute (provides funding for two Lodi educators to attend a week-long renewable energy resource training camp), presentations on clean energy at the Lodi Energy Smart Workshop events, and delivery of the new DVD/book entitled 'Teaching Solar' to area educators. In addition, The Rarus Institute staff will provide in-classroom presentations where requested, as well as ongoing consulting services to Lodi Electric Utility staff regarding solar and wind energy issues. The budget, and contract with The Rarus Institute, for this program is \$10,000.

As is the case with the Lodi *LivingWise Program*, the Lodi Solar Schoolhouse *Project* complements the energy education curriculum mandated by the State of California, allowing numerous Lodi educators to fulfill this educational requirement.

> **Lodi On-Line Energy Audit Program**: Lodi Electric Utility offers both on-site and on-line energy audits for residential customers (on-site audits are also provided for small and medium-sized commercial customers). The on-line service, known as the HomeEnergySuite, is provided by the firm APOGEE Interactive. The on-line tool provides customers with the ability to determine how their monthly energy dollars are expended. The tool also provides access to lighting and appliance calculators, an educational 'Kids Korner' and an energy conservation reference library. On average, fifty to seventy-five customers per month utilize this free service. The contract with APOGEE Interactive for the 2008-2009 fiscal year is in the amount of \$9,500. In addition to maintaining the database/on-line tool, APOGEE Interactive also provides monthly updates on customer "hits" (how many Customers are utilizing the service) and continually updates the energy conservation reference library with new and emerging energy technologies.

> **Lodi SHARE Customer Verification & Certification Project**: There are currently (as of May 1, 2008), 1,900 residential customers participating in the Lodi SHARE Electric Rate Discount. For eligible customers, this rate relief program provides a 30% monthly discount off the published, standard EA (residential) electric rate.

In order to ensure that all current participants of the program are presently eligible to receive this rate relief, the Electric Utility Department (EUD) is proposing to continue the "SHARE Customer Verification &

Certification Program" during the 2008-2009 fiscal year. To successfully achieve the goal of this program, Lodi Electric Utility will again enlist the professional services of the Salvation Army** (S.A.). The S.A. will randomly select 850 current **SHARE** customers, and then verify and confirm that all 850 customers (households) are still eligible to receive the aforementioned rate relief. If the customer meets the existing eligibility requirements, the S.A. will notify the utility. Likewise, if a customer fails to meet said requirements, the S.A. will notify the utility and that customer's rate relief will be discontinued. The S.A., as stipulated in the attached contract, will charge the EUD \$20 per customer verification/certification (850 customer screenings 'x' \$20 = \$17,000). NOTE: the total requested allocation for this program is \$18,000; of this amount, \$1,000 is earmarked for customer outreach/notification, brochure and verification/certification applications and other materials as needed).

In the summer and early fall of 2007, the S.A. performed 692 customer assessments as part of the Phase I 'Lodi Share Customer Verification & Certification Project.' Of that total figure, 252 customers (36.5%) were removed from the rate discount for various reasons (including: customer failed to meet income guidelines, customer had moved, customer was deceased, customer voluntarily removed their name from the program). The total amount of the rate discount received by these 252 customers during the 2006-2007 fiscal year was \$83,751.66.

In order to qualify for the SHARE Rate Discount, the customer is required to certify income eligibility. The income levels for 1 to 4 persons in a household range from \$22,000 to \$31,100, and customers must show all proof of income for all members (when applicable) of the household. In addition, the customer must sign a statement upon application indicating that the COL may verify the customer's eligibility at any time. If it is determined during the verification process that a customer is not eligible to receive the discount, the customer will be removed from the program and the COL may render corrective billing.

**The S.A. was selected to serve as the screening agent for this program for two reasons: 1) their experience and expertise in providing services of a similar nature for other entities (PG & E, San Joaquin County); and 2) the S.A. has served successfully as the administrator of the "Lodi C.A.R.E. Package Program" since 2005 – this is a utility grant payment program funded through Lodi's Public Benefits Program.

> **Lodi CARE Package Program**: Since late 2004, the City of Lodi has provided a special grant program designed to assist Lodi families in paying their monthly utility bill. To qualify for a grant, a customer must earn **less** than the published federal income guidelines. Specifically, the Lodi CARE Package Program will provide a relief payment of up to \$125* for eligible families/customers. Other program specifics include:

- 9 a customer in need will be interviewed by staff of the Lodi Salvation Army at the Lockeford Street facility; the family/customer must meet eligibility requirements, as listed on 'Attachment A;'
- 9 if approved for a relief payment, the Salvation Army will notify the City of Lodi Finance Department of eligible customer name, and the exact amount of the relief payment;
- the Salvation Army will also notify the City of Lodi Electric Utility Department of approved customers; these customers will automatically be enrolled in the Lodi Energy Audit Program and receive a free in-home energy audit;
- 9 customers are eligible to receive a maximum grant amount of \$125 every six months;
- a set of income guidelines has been developed for this program, and will be utilized as part of the assessment process conducted by the Salvation Army (please see 'Attachment B');'
- 9 in order to receive the maximum relief payment of \$125, a customer must have no past due amounts owed to the City of Lodi, and must be able to pay the remaining portion of their current City of Lodi utility statement (the water and wastewater charges).

The following two entities are providing the funds available for the relief payments:

- 9 City of Lodi Electric Utility - \$25,000 total; of this amount, \$19,500 is earmarked for relief payments to the customers in need. The \$19,500 is ONLY for payment of the electric utility component of customer bills. \$5,000 is earmarked as the payment due to the Salvation Army for their assessment services, and \$500 is earmarked for customer outreach and material preparation costs.
- WM® Waste Management - \$10,000 total: these funds will be designated solely for the purpose of paying the refuse component of a customer's bill (maximum payment is \$25 per customer; one such payment every six months).

Since the program's inception, over 725 Lodi customers have participated in the program and received a grant payment. The intent of the Lodi CARE Package Program is to assist those customers – currently living on wages 20 percent below the published federal income guidelines – in paying their monthly City of Lodi utility bill, particularly when the customer is facing a difficult period. The program is a “safety net” of sorts for customers experiencing a particularly difficult or unexpected financial hardship.

In order to adequately qualify customers for a relief payment, Lodi Electric Utility will again utilize the Lodi Salvation Army (S.A.) to serve as the day-to-day administrator of the program. The **S.A.** will charge the City of Lodi a fee of \$20 per customer assessment (not to exceed \$5,000 during the 2008-2009 fiscal year). The S.A. has provided the same assessment services for this program since late 2004.

This relief payment was derived by assessing the average bill of a utility customer currently receiving a rate discount as part of the Lodi SHARE Program (the SHARE rate discount provides eligible customers with a monthly 30% rate discount on their City of Lodi electric bill). Two months were used as part of the assessment (July and November 2007). Of these two months, the average July utility bill for electric only was \$100, while the average November utility bill for electric only was \$52. Based upon this assessment, it was determined that the electric utility component of the relief payment be capped at \$100. **Also** during this aforementioned assessment process, it was determined that the average refuse component of a City of Lodi utility statement is \$21 (hence, a cap of \$25 is recommended as the refuse component of the relief payment). The two relief components, electric and refuse, then equal a maximum grant of \$125 per eligible customer.

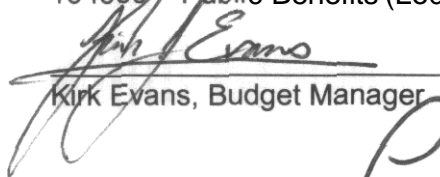
By way of this Council action, Electric Utility staff is recommending approval of Public Benefit Program funds for the five aforementioned programs/projects, as well as the approval of the attached contracts with:

- 1) Resource Action Programs to assist in administering/implementing the Lodi *LivingWise Program*- **~~\$20,000~~**
- 2) The Rachus Institute to assist in administering/implementing the *Lodi Solar Schoolhouse Project*- **~~\$10,000~~**
- 3) APOGEE Interactive to provide on-line services for the Lodi Energy Audit Program- **~~\$9,500~~**
- 4) The Lodi Salvation Army to assist in administering:
 - A) Lodi SHARE Verification Project- **~~\$18,000~~** (total contract amount ***is \$7,000***)
 - B) Lodi CARE Package Program- **~~\$25,000~~** (total contract amount ***is \$5,000***)

As all four entities have proven to provide excellent service to the City of Lodi, the Electric Utility Department respectfully requests that the Lodi City Council dispense with going out to bid pursuant to Lodi Municipal Code 3.20.070, and authorize the City Manager to execute professional service contracts with these entities for the 2008-2009 fiscal year.

FISCAL IMPACT: \$82,500; these are funds that are required to be collected and expended under state law in various Public Benefit program categories.

FUNDING: 164605 – Public Benefits (Demand-side Management) - \$29,500
164606 – Public Benefits (Low-Income Customer Assistance) - \$5,000
164608 – Public Benefits (Renewable Energy Resources) - \$10,000
164609 – Public Benefits (Lodi CARE Package Program) - \$25,000



Kirk Evans, Budget Manager



George F. Morrow
Electric Utility Director

Prepared By: Rob Lechner, Manager, Customer Service and Programs

GFM/rsi/lst

Attachments

RESOLUTION NO. 2008-105

A RESOLUTION OF THE LODI CITY COUNCIL
APPROVING PUBLIC BENEFIT PROGRAMS, AND FURTHER
AUTHORIZING THE CITY MANAGER TO EXECUTE
NECESSARY PROFESSIONAL SERVICES AGREEMENTS

NOW, THEREFORE, BE IT RESOLVED that the Lodi City Council does hereby approve Public Benefit Programs for the following program extensions and/or renewals as follows and as shown on the project descriptions marked Exhibit A attached hereto:

- 1) Lodi LivingWise Program - \$20,000
- 2) Lodi Solar Schoolhouse Project - \$10,000
- 3) Lodi On-Line Energy Audit Program - \$9,500
- 4) Lodi SHARE Customer Verification & Certification Project - \$18,000
- 5) Lodi CARE Package Program - \$25,000

BE IT FURTHER RESOLVED that the City Manager is hereby authorized and directed to execute professional services agreements required for each Public Benefit Program as outlined in Exhibit A attached.

Dated: June 4, 2008

I hereby certify that Resolution No. 2008-105 was passed and adopted by the City Council of the City of Lodi in a regular meeting held June 4, 2008, by the following Vote:

AYES: COUNCIL MEMBERS – Hansen, Hitchcock, and Katzakian

NOES: COUNCIL MEMBERS – None

ABSENT: COUNCIL MEMBERS – Johnson and Mayor Mounce

ABSTAIN: COUNCIL MEMBERS – None



RANDI JOHL
City Clerk

EXHIBIT A

1. Lodi LivingWise Program: Nearly 2,450 Lodi students and their families have participated in this program since 2003. The program provides students and educators at Lodi area schools with a useful tool that demonstrates energy and water conservation. The budget for the 2008-2009 school year (Lodi fiscal year) is \$20,000. The funds allocated are paid to Resource Action Programs of Modesto, California. This firm provides the energy efficiency kits (please see next paragraph) to the classrooms, schedules delivery of said kits to meet the individual teacher timeframes and produces a school-by-school report of efficiency savings once the program year is complete.

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Lodi Public Benefit Programs

FY 2008-2009 (K-3)

Lodi City Council
June 4, 2008



Overview

- For Council Agenda Item K-3, there are five (5) Public Benefit Programs
- All five of these programs involve contracting some level of service from a third-party vendor/consultant



Lodi LivingWise Program

- Proposed Funding: **\$20,000**
- Year six of this program
- Provides energy/water conservation kits for up to 437 6th grade Lodi students/teachers
- Electric Utility representative visits each participating classroom to “kick-off” the project
- Contract for materials/services with Resource Action Programs of Modesto, CA




Lodi Solar Schoolhouse Project

- Proposed Funding: **\$10,000**
- Year seven of this program
- Over 1,200 students and educators have participated since 2002
- Program is designed to promote renewable energy resources (i.e.: solar & wind) to Lodi students/educators – includes teacher training and classroom activities
- Contract for services is with The Rachus Institute of Martinez, CA



On-Line Energy Audit Program

- Proposed Funding: **\$9,500**
- provide on-line computer energy audits for residential customers 
- 50 to 75 customers per month utilize this service
- contract for services is with APOGEE Interactive of Tucker, Georgia



SHARE Customer Verification & Certification Project

- Proposed Funding: **\$18,000**
- Phase II of a multiple-phase project to verify and certify that those residential customers participating in the Lodi SHARE Electric Rate Discount are eligible to continue receiving this rate discount



SHARE Customer Verification & Certification Project (cont.)

- Phase II will include 850 customer verifications
- In Phase I, 692 customers were assessed for participation; 252 or 36.5% were removed because they did not meet income guidelines or for another reason
- The SHARE Rate provides a discount of 30% off a qualifying residential customer's monthly electric utility bill
- Contract is with the Lodi Salvation Army for customer verification/certification services



Lodi CARE Package Program

- Proposed Funding: **\$25,000**
- Grants made available to residential customers that are 20% below the Federal Income Guidelines
- Grant covers ONLY electric and refuse component of City of Lodi utility bill
- Maximum grant is \$125 – available every six months; \$100 cap for electric; \$25 cap for refuse



Lodi CARE Package Program (cont.)

- Program is now entering its 4th year
- To date, 725 customers have received a grant payment
- Contract for services is with the Lodi Salvation Army (to determine customer eligibility)



“Fine Print”

- Most of these Public Benefit Programs are based upon a first-come, first-served basis, and are provided until funds are exhausted
- For specific program information, Lodi residents/educators (for our education programs) can view our web site: www.lodielectric.com; or call us at 333-6815

